



Date: _____

7 Questions to ask a Retirement Plan Specialist.

1 What retirement accounts are available to me?

2 How much will I need to retire comfortably?

3 What is the optimal retirement savings rate for someone in my position?

4 How can I maximize the tax benefits of my retirement savings?

5 What are the best investment options for someone in my situation?

6 What is a timeline for retiring, given my current retirement savings?

7 How can I balance saving for retirement with other financial goals?
